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ABSTRACT

A project conducted in the volunteer program of a county library system in a midwestern city assisted the volunteer coordinator in assessing the library's performance appraisal process for volunteers and in identifying ways to make the process more effective. Factors in performance appraisal which were most applicable and effective to the context of volunteerism were uncovered, and interviews with selected staff and volunteer personnel identified the system then in place for training and evaluating volunteers. The information obtained in these interviews was then used to construct a questionnaire that was administered to 100 of the program's volunteers and the staff working with volunteers to assess how each group viewed the system and to elicit feedback about what each group wanted to see included in a performance appraisal mechanism. Thirty-six volunteers and 54 staff members completed questionnaires. After evaluating the surveys and questionnaires, a new performance appraisal system was developed and recommended. In addition, in response to staff requests for feedback from volunteers about their experience, another form was developed to permit volunteers to provide their opinion of their experience in the library. (Three tables of data are included; 23 references are attached.) (Author/KEH)

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Performance Appraisal Development

In a Volunteer Program

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Performance Appraisal Development

In a Volunteer Program

ABSTRACT

Volunteer coordinators in the independent sector are taking a more formal approach to the selection, training, and evaluation of volunteer job performance. This paper summarizes a project conducted in the volunteer program of a county library system in a Midwestern city. The county library's Volunteer Coordinator requested assistance in assessment of the library's current performance appraisal process for volunteers, and identification of ways to make the process more effective for volunteers and staff. Since volunteerism relies upon intrinsic motivators such as feedback to retain and encourage its participants, we sought to uncover those factors in performance appraisal which were most applicable and effective to the context of volunteerism. Through interviews with selected staff and volunteer personnel we identified the system then in place for training and evaluating volunteers. The information obtained in these interviews was used to construct a questionnaire that was administered to 100 of the program's volunteers and key staff personnel working with volunteers to assess how each group viewed the system then in place, and to get feedback about what each group wanted to see included in a performance appraisal mechanism. After evaluating the surveys and questionnaires a new performance appraisal system was developed and recommended. In addition, in response to staff request for feedback from volunteers about their experience another form was developed for volunteers to provide their opinion of their experience in the library.

Performance Appraisal Development In A Volunteer Program

In the organizational science literature a great deal has been written about the feedback process (Cusella, 1987). The majority of the literature deals with paid employees. Yet, today, volunteer coordinators in the independent sector are also taking a more formal approach to the selection and training of volunteers and the evaluation of their performance. In the volunteer literature we found support for the development of a mechanism to evaluate the performance of volunteers (Cull & Hardy, 1974; Ellis, 1986; Gidron, 1983; Laufer & Gorodesky, 1977; Mason, 1984; Park, 1983; Setterberg & Schulman, 1976; Stenzel & Feeney, 1976; Vineyard, 1988; William, 1974; & Wilson, 1976.) Even though McHenry (1988) suggested that a formal appraisal process may be threatening to the library volunteer, nevertheless, she recognized that volunteers be allowed to rate their own performance as a form of evaluation. Further, she advised the library professional should at some point discuss the performance of the organization's volunteers with them.

In the volunteer context performance appraisal serves a special purpose. Park (1983) suggested that accountability provides structure for the commitment of the volunteer while respecting the freedom of the volunteer's choice to give of their time and energy in the volunteer context. Further, she acknowledged that accountability is a way in which to build "mutual respect and obligation among all parties involved in

order to make the best use of all resources available for meeting the challenges at hand" (p. 86.).

Often volunteers find themselves in a double-bind (Vineyard, 1988). At first they encounter a rigorous selection process in which messages from the volunteer coordinator indicate that "not just anyone gets to be a volunteer here." Yet, after they spend time in the volunteer context, the volunteers find there may be no process in place that provides them with feedback concerning their contribution. In public institutions where limited budgets may constrain the number of staff available to perform all functions required to maintain viable service to the community, volunteerism is often relied upon to free staff time for the more technical tasks that require special expertise for the institution's viability. If volunteers see only the paid staff held accountable, the volunteers may interpret this "staff only" accountability as meaning that the volunteer job is not really important to the function of the institution (Vineyard, 1988.)

If volunteers feel their jobs are not really important to the organization, then, Mason (1984) and Park (1983) believe volunteers may feel that their only obligation in the volunteer context is to "show up". However, through the appraisal process volunteers can be reminded of the value of their jobs and the objective of their activities.

People given the responsibility of managing volunteers must view the evaluation process as a mechanism that will help

individual volunteers grow and succeed (Vineyard, 1988). The evaluation is part of supervision. It should be scheduled regularly and focus on the strength and weakness of volunteers' performance (Lauffer & Gorodesky, 1977). At the same time, consultants such as Sue Ellis of Energize, Associates, make it clear that volunteers should be informed "in advance that there will be periodic assessment, that it is done equitably for all volunteers, and that it is based on ...[the job description]" (1988, p. 133). Ellis further explained that evaluations should allow volunteers an opportunity to express their feelings about the organization and about the kind(s) of supervision received. She also suggested evaluations be discussed in terms of progress reports or future action plans. "This sounds less judgmental and emphasizes moving forward rather than simply looking back" (p. 133).

Feedback and Performance Appraisal

Greller & Herold (1975) noted that feedback serves as appraisal information by providing information about job expectations, as well as, an assessment about how well an individual carries out these expectations. Ashford (1986) noted feedback is particularly important to individuals who are new on the job or who are pursuing a new or unfamiliar position within the organization. Beer (1987) suggested feedback helps subordinates learn more about their job requirements. Indeed the learning process is important to develop their competence. "No sense of mastery is possible without the availability and use

of this feedback information" (Ashford & Cummings, 1983, p. 375). Further, Ashford and Cummings (1983) noted that individuals seek feedback to provide them with information about job performance as well as how well they are socialized within the organization's structure. Cusella (1980) identified the purpose of feedback to include reward, information, cues, motivation, regulation and learning. Deci and Ryan's (1980) Cognitive Evaluation Theory is also helpful to explain that feedback (as reward) has two aspects: (1) to control the reward-receiver's behavior, and (2) to inform a person about his or her competence and self-determination. Beer (1987) identified the goals of the performance appraisal process as a mechanism to inform subordinates about where they stand; to assist the manager in making decisions about subordinates; to counsel and coach; to develop commitment on the part of the subordinate; to motivate the subordinate; to increase the strength to the supervisor-subordinate relationship; and to recognize problems that may exist. The evaluation of performance, therefore, is part of the organizational process (Beer, 1987).

Guidelines for the construction of an effective performance appraisal can be found within the context of the organization itself (Williams and Hummert, in press). Specifically, when subordinates take part in the construction of a performance mechanism they are more satisfied with the process, they "will be more satisfied with that system, evaluation will be more accurate, and the process is more likely to results in positive

behavior change" (p. 13). Supervisors and subordinates who have coordinated their beliefs about their work responsibilities will have an improved work relationship and therefore, "a more productive performance evaluation process" (p. 13). If the beliefs of the organization's employees are taken into account in the development of the performance appraisal mechanism, then it will reflect the members' understanding of what productive behavior is expected of them (Williams and Hummert, in press).

McGregor (1957) recognized the importance of including the subordinate in the identification of performance goals. In addition, he suggested that subordinates need to know how they are doing, and what changes in behavior, if any, are necessary to improve performance. Marshall Sashkin (1981) building on McGregor's groundwork, identified ten heuristics for the construction of effective performance appraisal systems. Of these ten, we found six applicable to the appraisal of volunteers. These include: rewards for managers who develop subordinates; training and skills to use the system; job-descriptions based on performance standards; active subordinate involvement in the appraisal process; mutual goal setting; and the use of efficient and simplified paper work in the appraisal process.

As the result of a prior research effort, the Volunteer Coordinator for the county library system expressed the need to establish a more formal performance appraisal system to be used within the library's volunteer program. Her interest was two-

fold. First, her supervisor requested a formal system be institutionalized to account more accurately for volunteer behavior. She requested this formal system because the goal for the program was to increase by 50 percent its number of volunteers as part of an expansion of the county library system. Second, the Volunteer Coordinator had participated in a management training program at the University of Colorado centered around the management of volunteers, and she had read extensively in the volunteer literature.

We met with the Volunteer Coordinator and the Deputy Librarian and assessed the goals of our intervention. These included:

1. Determine volunteer and staff expectations about volunteer performance. (For example, how well do volunteers understand what is expected of them; how well do they understand the requirements of their job; how effectively does the staff function as supervisors of volunteers.)

2. Who should provide feedback to volunteers: the staff supervisor or the volunteer coordinator?

3. How adequate is current recognition of volunteers, and of staff for their work with volunteers?

4. How necessary is it for volunteers to understand how their specific job fits within the branch and the library system?

5. Do the staff supervisors desire feedback from volunteers about how well they interact as a supervisor of volunteers? Do volunteers desire to provide such feedback?.

6. How willing are the volunteers to work directly with staff members rather than working through the volunteer coordinator?

In addition, the Volunteer Coordinator requested specific

information concerning the orientation program for volunteers, demographics of the library's volunteers, and volunteers overall assessment of their experience in the program. Since these three objectives were requested by the Volunteer Coordinator, and were tangential to the construction of the performance appraisal form we will not report their results in this paper.

Methods

Subjects

For the purposes of this investigation we felt that is was important initially to conduct interviews with various staff and volunteer personnel (following the suggestion of Williams and Hummert, 1988) to ask them about the current evaluation system and any suggestions they might have in the development of the new system.

From staff personnel, the Volunteer Coordinator selected 20 staff supervisors, all of whom either worked directly with and/or supervised volunteers. These supervisors worked in a variety of jobs from Branch Librarian to direct supervision in a smaller department of the library such as the Children's Section. From among the 100 volunteers working in the library system another 20 individuals were also chosen to be interviewed. The service history of those interviewed ranged from a few months to fifteen years, and included retired professional people, people who had retired from jobs in the private sector where they supervised individuals, people who had not participated in gainful employment, but had been lifelong volunteers across a

variety of contexts, and a former librarian.

Procedures for Interviews

The interviews were conducted at the various branches and took an average of 40 minutes each. Supervisors were asked how they felt about working with volunteers and what needs they felt should be met in order to improve the program. They were asked what improvements, if any, were needed in the present evaluation system, and if they felt that conducting the performance appraisals was a job they could take on without undue stress to their current job responsibilities. Volunteers were asked how they liked the current program, what they felt was necessary to improve the program, if they would welcome a performance appraisal (progress report), how they would like it to be conducted and with whom.

Interviewees were asked how they felt about the inclusion of fourteen specific points within an appraisal process. These points were selected from two sources. Sashkin's 1981 article and the Volunteer Evaluation form used by the Volunteer Coordinator to provide feedback to volunteers at the completion of their first 20 hours of volunteer work for the library. These fourteen points included: 1) arrives as scheduled, 2) learns quickly, 3) accepts supervision, 4) shows initiative, 5) gets along well with co-workers, 6) gets along well with patrons, 7) is willing to accept changes in regular routine, 8) is enthusiastic, 9) works well alone on assigned duties, 10) knows and understands requirements of job, 11) completes tasks

accurately, 12) completes tasks in a timely manner, 13) shows interest in learning new skills, and 14) offers constructive suggestions for improving job performance.

Instruments

Results from the interviews were studied and content coded for categories or themes. From these results two instruments were composed. One was to be administered to the staff and the other to the volunteers. Twenty categories or themes were identified. They were separated into two general groups. The first included variables that addressed the appraisal process and volunteer performance, and the second group included variables that addressed several program concerns important to the Volunteer Coordinator (This second group of variables is not reported in this paper).

The two instruments mirrored one another on the issues of cross training (CRSTRN), feedback to staff (FBKGIV), the importance of written job descriptions (JBDSCPT); the ability of the written job description to clarify job expectations (OPWRAG); and how often volunteers should receive feedback about their performance (OPNFBK).

The completed instruments were distributed to staff who worked directly with and/or who supervised volunteers, and to volunteers in the various branches of the library. Participants were given two weeks to complete the questionnaire and were asked to return it to the Volunteer Coordinator in a sealed envelop. We picked up the completed questionnaires from the Volunteer

Coordinator.

RESULTS

Of the 100 volunteers working for the library system, 36 turned in completed questionnaires, and of the 170 staff solicited, 54 responded. We later learned that the individuals, both volunteers and staff, who participated in the initial interview process did not feel inclined to respond to the final instruments as they reflected the input of these individuals. It should also be noted that the number of staff actually supervising or working directly with volunteers was less than 100 persons.

Means were calculated for the responses to the fourteen points (identified on pages 10 & 11) that could be used to assess the performance of new and regular volunteers and are reported in Tables 1 and 2. Results of the MANOVA showed no significant differences between the responses for staff and volunteers. (New volunteers were those who had served the library system less than one year, and regular volunteers included those persons with more than one year of service.)

On the final appraisal form, the fourteen points were divided into two categories: Job Performance and Job Attitude. Job performance included: arrives as scheduled, learns quickly, accepts supervision, shows initiative, works well alone, knows and understands requirements of job, completes tasks accurately, and completes tasks in a timely manner. Job attitude included:

gets along well with co-workers, gets along well with patrons, is willing to accept changes in regular routine, is enthusiastic, shows interest in learning new skills, and offers constructive suggestions for improving job performance.

Means for the mirrored items on the questionnaires were calculated and are presented in Table 3. The MANOVA calculations for these five variables revealed no significant differences between the opinions of staff and volunteers for job description (JBDSCPT) and giving feedback to staff (FBKGIV). However, significant differences were found between staff and volunteers for the other three variables. Staff and volunteers opinion of feedback (OPNFBK) was significantly different, $F(1, 76) = 7.914$, $p < .006$. Moreover, we found significant differences in their scores on cross training volunteers (CRSTRN), $F(1, 76) = 17.071$, $p < .000$. Finally, staff scored more highly than volunteers in their opinion of a written job description, $F(1,76) = 36.642$, $p < .000$. In fact staff were more strongly in favor of each of the three variables.

DISCUSSION

Results of the investigation yielded findings that allowed us to make recommendations about the appraisal process within the county's library system. Since staff and volunteer personnel agreed on the importance of the fourteen items for the appraisal process, we recommended their use in the final volunteer appraisal form. On the questionnaire we asked both staff and volunteers when they felt New and Regular volunteers should be

evaluated. The consensus was to appraise a New volunteer's performance at the completion of the initial twenty hours of service and then, at the completion of three months of service. Regular volunteers' performance was to be appraised once each year. From additional information gathered, we recommended that the appraisal form include open-ended statements that would allow the staff to make suggestions about a volunteer's future with the library.

As stated earlier, we felt that the differences found between the opinions of staff personnel and volunteers regarding Cross Training, Opinion of Feedback, and Opinion of a Written Job-Description were due to a lack of information on the volunteers' part about how these variables would assist the Volunteer Coordinator and the staff to maintain a professional and flexible program within the library's use of volunteers. In addition, the staff personnel had experience in the appraisal process with their own paid subordinates, and they were aware of the value of a written job-description, cross training, and an appraisal process. It was curious that in spite of the agreement between staff and volunteers about the format of the appraisal form, the volunteers scored so low on their opinion of feedback. (The mean for volunteers was 3.106, and the mean for staff was 3.630.) We feel this may be due to the fact that of the 20 volunteers interviewed, 18 were strongly in favor of performance appraisal, and since this group did not respond to the final questionnaire, their opinion was not included in its

analysis.

The final form was presented to the Deputy Librarian and the Volunteer Coordinator in the form of an executive summary. We also recommended that we return to the library after 18 months to examine the appraisal forms and to calculate the norms for the performance appraisals administered during the 18 month period.

There were limitations to this work because of the low response rate of the volunteers to the questionnaire. However, we felt that the high evaluations of the volunteer program by the volunteers during the interview process indicated that volunteers were pleased with their experience in the library and impressed with the professional approach taken by the Volunteer Coordinator in placement and training of volunteers.

According to Peter Drucker (1988), the casual attitude toward the evaluation of volunteers can no longer be tolerated. As more accountability is found in the volunteer context formal performance appraisals will become a standard procedure as the services provided by volunteer programs can no longer afford to include individuals just because they "mean well". Non-performers will be out-placed. Volunteer programs are now placing emphasis on accountability and results, not just on the "good cause" they represent.

The performance appraisal mechanism designed for this library was constructed to meet the program goals sought by the Volunteer Coordinator and the Deputy Librarian. Following Willians and Hummert (in press) different contexts present

different needs for performance appraisal. Therefore, results of this work could not be generalized to other contexts.

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Table 1.
Mean scores of Staff and Volunteers for 14 Variables for the Performance Appraisal Format for New Volunteers.

	Staff		Volunteers	
	Mean	SD	Mean	SD
1	4.551	.792	4.452	.768
2	4.224	.798	4.161	.779
3	4.592	.610	4.419	.720
4	4.163	.874	4.161	.688
5	4.429	.736	4.387	.615
6	4.429	.791	4.516	.724
7	4.204	.866	4.097	.944
8	4.327	.689	4.290	.783
9	4.245	.804	4.290	.739
10	4.408	.705	4.290	.783
11	4.490	.681	4.452	.675
12	4.347	.805	4.129	.763
13	4.102	.984	4.323	.748
14	3.878	1.053	3.839	.969

Table 2.
Mean scores of Staff and Volunteers for 14 Variables for the Performance Appraisal Format for Regular Volunteers.

	Staff		Volunteers	
	Mean	SD	Mean	SD
1	4.412	.876	4.344	.902
2	4.118	.887	4.062	.759
3	4.490	.703	4.406	.665
4	4.216	.808	4.187	.738
5	4.588	.606	4.406	.560
6	4.412	.753	4.562	.716
7	4.333	.766	4.250	.803
8	4.314	.707	4.344	.701
9	4.608	.603	4.500	.622
10	4.569	.671	4.625	.554
11	4.647	.594	4.625	.609
12	4.529	.703	4.375	.554
13	4.255	.891	4.250	.718
14	4.176	.932	4.156	.808

Table 3.
Means used to measure staff and volunteer attitudes for six variables.

Variable	Staff	Volunteers
CRSTRN	3.667	2.400
FBKGIV	3.271	2.933
JBDSCPT	3.392	3.194
OPNFBK	3.630	3.106
OPWRAG	4.229	2.950

CRSTRN: Important to cross train volunteers so that they would be able to perform a variety of tasks.
FBKGIV: Desire of volunteers to provide feedback to staff about the staff member's manner and method of working with volunteers.
JBDSCPT: Importance of a written job description.
OPNFBK: Opinion of Staff about providing some kind of feedback or progress discussion with a volunteer.
OPWRAG: Necessity for a formal, written job description for each volunteer job within the library.